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Currency Rates and U.S. Poultry Exports

Poultry exports are expected to be stronger in 2004 when compared to 2003. Factors improving poultry exports include the resolution of trade policy questions with Mexico and Russia, restrictions in place on exports of U.S. and Canadian beef, and the weakness of the U.S. dollar against a number of currencies.

On Monday, January 12, 2004 the Euro reached a record high near \$1.29 before easing down to \$1.2769. By Monday January 19 the Euro was \$1.21690 (\$1 was equal to .8218 Euro).

Currency Comparisons to US Dollar			
	Jan 19, 2004	Jan 20, 2003	% chg
United Kingdom Pound	0.5561	.62030	-10%
Canadian Dollar	1.3014	1.53490	-15%
Euro	0.8218	.93850	-12%
Japanese Yen	106.700	117.94000	-10%
Brazilian Real	2.82900	3.40740	-17%

Source: USDA/Economic Research Service, various news wires

Update Highly Pathogenic Avian Influenza

H5N1 (HPAI) has been confirmed in South Korea, Japan and Vietnam.

South Korea, December 2003, up to Jan 14 – 1.8 million birds slaughtered. After a nine day lull, on January 13 a new case was discovered, resulting in the slaughter of 18,000 birds at the farm and plans to slaughter more than 900,000 more chickens and ducks within a 1.9-mile radius of the farm.

Japan, December 2003, 6,000 table egg layers died and the remaining 35,000 birds were slaughtered.

Vietnam, January 2004, to Jan 15 over 1 million birds slaughtered. Avian influenza has been found in 20 of Vietnam's 64 provinces. WHO has confirmed five human deaths from the avian flu. At the end of 2003 Viet Nam had 185 million chickens.

Unconfirmed: AI (H5N2) was detected in Taiwan in January, resulting in the death/slaughter of, 55,000 chickens on two farms

Fowl Cholera and bronchitis are having a severe impact in Thailand. Thailand, the world's fourth largest poultry exporter, states they do not have any form of avian influenza. A combination of severely cold weather and an ongoing outbreak of fowl cholera has effected flocks in Thailand. Estimates have ranged from 850,000 to 1.5 million chickens killed under epidemic controls.

In 2003 an outbreak of H7N7 in the Netherlands resulted in the slaughter of over 30 million birds.

Source: World Health Organization, United Nations, various news wires

Mexico: Poultry meat prices could increase due to the BSE scare

The President of the Poultry Producers Association in Mexico, Cesar de Anda, indicated that the tendency of consumers to substitute beef for poultry, due to the BSE scare, could result in price increases of about ten percent during the next few weeks. He explained that at the end of 2003, domestic demand increased but there is no information that it was due to BSE or the public campaign that was carried out to consume chicken for Christmas. (Source: El Financiero, 1/12/04)

Source: USDA/Foreign Agricultural Service

Japan Imports

Powdered Egg Products

	Powdered Whole Eggs	Powdered Yolks	Powdered Albumen	Total
2002				
September	381.2	233.7	708.8	1,323.7
October	312.5	176.4	815.5	1,304.4
YTD	2,517.0	1,975.7	7,473.1	11,965.8
2003				
September	317.8	178.1	666.5	1,162.4
October	275.1	190.4	855.4	1,320.9
YTD	2,279.3	1,867.3	7,226.3	11,372.9

Frozen Egg Products

	Frozen Whole Eggs	Frozen Yolks	Frozen Albumen	Total
2002				
September	226.8	1,430.4	18.1	1,675.3
October	310.6	579.0	18.1	907.7
YTD	2,476.9	9,763.5	356.3	12,596.7
2003				
September	228.5	976.5	0.0	1,205.0
October	257.5	663.5	0.0	921.0
YTD	2,210.6	9,197.7	46.4	11,454.7

Frozen Broilers in metric tons

	U.S.	China	Brazil	Thailand	Total
2002					
September	3,006	8,846	8,350	13,277	33,479
October	3,588	10,933	16,175	13,837	44,533
YTD	37,015	94,394	139,901	156,456	427,766
2003					
September	4,928	353	19,817	17,809	42,907
October	4,444	4,750	23,338	15,168	47,700
YTD	42,699	51,327	152,580	146,467	393,073

Source: ALIC

INSPECTED EGG PRODUCTS-U.S. & CANADA IMPORT/EXPORT TRADE**U.S. Exports to Canada, in Pounds (000) (Preliminary)**

	Week Ending January 03, 2004		Year-To-Date	
Type	2003	2002 /1/2	2003	2002
Liquid	90	0	17,381	20,780
Frozen	0	0	96	21
Dried	0	0	599	915
Total	90	0	18,076	21,716

U.S. Imports From Canada, in Pounds (000) (Preliminary)

	Week Ending January 03, 2004		Year-To-Date	
Type	2003	2002 /1/2	2003	2002
Liquid	36	0	5,488	6,034
Frozen	0	0	3,706	3,440
Dried	0	0	1,292	5,209
Total	36	0	10,486	14,683

Inspected Shell Eggs**U.S Exports To Canada, In 30-Dozen Cases (Preliminary)**

	Week Ending January 03, 2004		Year-To-Date	
	2003	2002 /1/2	2003	2002
Jumbo	0	0	655	1,723
Extra Large	1,110	0	46,568	56,278
Large	3,055	0	155,351	164,804
Medium	1,623	0	71,413	53,224
Ungraded	0	0	182,412	373,945
Misc	0	0	14,642	14,017
Total	5,788	0	471,041	663,991

Comparable Week, to-date figures may not total due to rounding.
Source: USDA/AMS Poultry Programs, Market News Branch in cooperation with Agriculture Canada, Poultry Development Division.

CENTRAL REGION MECHANICALLY SEPARATED CHICKEN

F.O.B. SHIPPER DOCK OR EQUIVALENT, PRICES NEGOTIATED FOR MECHANICALLY SEPARATED CHICKEN IN THE CENTRAL REGION IN TRUCKLOT AND LESS THAN TRUCKLOT VOLUMES, CENTS PER POUND, DELIVERY WITHIN TWO WEEKS.

CHICKEN 16-JAN-2004
— PRICES — VOLUME —
(Cents per Pound)

FAT CONTENT	FROZEN	FRESH	TOTAL	EXPORT
15% OR LESS				
RANGE	-	-	-	-
WTD AVERAGE				

CHICKEN, WITH SKIN ADDED

— PRICES — VOLUME —
(Cents per Pound)

FAT CONTENT	FROZEN	FRESH	TOTAL	EXPORT
15% OR LESS				
RANGE	15.50-18.00	13.00-16.00	284,000	-
WTD AVERAGE	16.75	14.20		
15-20%				
RANGE	13.50-17.00	10.00-14.00	1,833,600	224,400
WTD AVERAGE	15.49	11.16		
20% OR MORE				
RANGE	-	-	-	-
WTD AVERAGE				

* INCLUDES THE STATES of AL, AR, IA, IL, IN, KS, KY, LA, MI, MN,

U.S./CANADIAN LIVE POULTRY SLAUGHTERED UNDER INSPECTION

Week Ending January 03, 2004 (PRELIMINARY)

U.S. FOWL SLAUGHTERED DOMESTICALLY

	LIGHT HENS	HEAVY HENS	TOTAL HENS
	THOUSANDS		
HEAD	1,118	898	2,016
LAST WEEK	918	808	1,726
SAME WEEK YR AGO	1,179	1,127	2,306
TO-DATE/2003	74,013	73,017	147,030
TO-DATE/2002 /1	89,440	72,815	162,255

U.S. FOWL SLAUGHTERED IN CANADA

	LIGHT HENS	HEAVY HENS	TOTAL HENS
	THOUSANDS		
HEAD	150	0	150
LAST WEEK	88	7	95
SAME WEEK YR AGO	169	4	173
TO-DATE/2003	11,121	159	11,280
TO-DATE/2002 /1	15,401	301	15,702

Source: Agriculture Canada, Poultry Development Division

TOTAL U.S. FOWL SLAUGHTERED IN THE U.S. AND CANADA

	LIGHT HENS	HEAVY HENS	TOTAL HENS
HEAD	1,268	898	2,166
LAST WEEK	1,006	815	1,821
SAME WEEK YR AGO	1,348	1,131	2,479
TO-DATE/2003	85,134	73,176	158,310
TO-DATE/2002 /1	104,841	73,116	177,957

Source: USDA/AMS Poultry Programs, Market News Branch

EASTERN REGION MECHANICALLY SEPARATED CHICKEN

F.O.B. SHIPPER DOCK OR EQUIVALENT, PRICES NEGOTIATED FOR MECHANICALLY SEPARATED CHICKEN IN THE EASTERN REGION IN TRUCKLOT AND LESS THAN TRUCKLOT VOLUMES, CENTS PER POUND, DELIVERY WITHIN TWO WEEKS.

CHICKEN 16-JAN-2004
— PRICES — VOLUME —
(Cents per Pound)

FAT CONTENT	FROZEN	FRESH	TOTAL	EXPORT
15% OR LESS				
RANGE	-	-	-	-
WTD AVERAGE				

CHICKEN, WITH SKIN ADDED

— PRICES — VOLUME —
(Cents per Pound)

FAT CONTENT	FROZEN	FRESH	TOTAL	EXPORT
15% OR LESS				
RANGE	13.50-16.00	15.00	1,350,000	884,000
WTD AVERAGE	15.08	15.00		
15-20%				
RANGE	12.50-19.00	12.00-14.00	1,784,000	468,000
WTD AVERAGE	14.33	12.89		
20% OR MORE				
RANGE	-	12.00	200,000	-
WTD AVERAGE		12.00		

* INCLUDES THE STATES of CT, DE, FL, GA, MA, MD, ME, NC, NH, NJ, NY, PA, RI, SC, VA, VT, WV

NATIONAL YOUNG TURKEY PARTS AND BULK MEAT, FROZEN (UNLESS SPECIFIED), CENTS PER LB., DELIVERED FIRST RECEIVERS, PART AND FULL TRUCKLOTS AS OF 16 JANUARY 2004.

The undertone on fresh tom drums was steady to firm, frozen tom drums mixed ranging from barely steady to fully steady with heavy tom drums in the strongest position. The tom neck undertone was firm. The tom 2-joint wing undertone was unsettled with spot strength noted in the East to instances weak in other parts of the country with offers and trading noted at lower trending price levels. The undertone on tom full-cut wings was steady to instances weak. Fresh tom drum demand was good for domestic and export shipments and frozen was mostly slow to moderate. Offerings mixed. Tom full-cut and 2-joint wing demand was mixed and ranged from slow to instances good mostly light with some sellers unable to find willing buyers at current market levels. Tom neck demand good with offers short of buyers' needs. Export trading centered on a moderate volume of open priced fresh tom drums for February export shipments and on a moderate volume of firm priced tom drums for export, balance light. Domestic trading centered on fair volumes of fresh thigh meat at steady to instances lower trending prices and on fresh tom breast meat.

FRIDAY, JANUARY 16, 2004**EXPORT TRADING**

	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)	WEEKLY WTD AVG PRICE	WEEKLY VOLUME (000)
DRUMSTICKS, TOMS	38.00-43.00		39.89	508	40.34	788
WINGS FULL-CUT - TOMS		F	36.00	20		
WINGS, V-TYPE, TOM						
TAILS		W	25.00	40	25.00	40
MECHANICALLY SEPARATED 4/	22.00		22.00	40	22.00	80
THIGH MEAT - FROZEN	83.00-84.00		83.67	120	79.22	784

THURSDAY, JANUARY 15, 2004**EXPORT TRADING**

	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
DRUMSTICKS, TOMS	42.00		42.00	40
WINGS FULL-CUT - TOMS		F	36.00	20
WINGS, V-TYPE, TOM				
TAILS		W	25.00	40
MECHANICALLY SEPARATED 4/	22.00		22.00	40
THIGH MEAT - FROZEN	76.00-85.00		79.91	92

WEDNESDAY, JANUARY 14, 2004**EXPORT TRADING**

	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
DRUMSTICKS, TOMS		T	40.50	160
WINGS FULL-CUT - TOMS		F	36.00	20
WINGS, V-TYPE, TOM				
TAILS	25.00		25.00	40
MECHANICALLY SEPARATED 4/		R	19.17	156
THIGH MEAT - FROZEN	82.00		82.00	208

TUESDAY, JANUARY 13, 2004**EXPORT TRADING**

	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
DRUMSTICKS, TOMS	39.00-42.00		40.50	160
WINGS FULL-CUT - TOMS		F	36.00	20
WINGS, V-TYPE, TOM				
TAILS		W	25.00	40
MECHANICALLY SEPARATED 4/		R	19.17	156
THIGH MEAT - FROZEN		M	76.00	364

MONDAY, JANUARY 12, 2004**EXPORT TRADING**

	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
DRUMSTICKS, TOMS	42.00		42.00	80
WINGS FULL-CUT - TOMS		F	36.00	20
WINGS, V-TYPE, TOM				
TAILS		W	25.00	40
MECHANICALLY SEPARATED 4/		R	19.17	156
THIGH MEAT - FROZEN	76.00		76.00	364

1/ CODES FOR LAST SIGNIFICANT TRADE (L.S.T.): M=MONDAY T=TUESDAY W=WEDNESDAY R=THURSDAY F=FRIDAY

2/ Product contains 15-20% fat with skin added.

INSPECTED EGG PRODUCTS - U.S. & CANADA IMPORT/EXPORT TRADE**U.S. EXPORTS TO CANADA, IN POUNDS (000) (PRELIMINARY)**

Type	Week Ending		Year-To-Date	
	January 10, 2004			
	2004	2003 /1	2004	2003
Liquid	49	416	49	416
Frozen	0	0	0	0
Dried	0	0	599	915
Total	49	416	648	1,331

U.S. IMPORTS FROM CANADA, IN POUNDS (000) (PRELIMINARY)

Type	Week Ending		Year-To-Date	
	January 10, 2004			
	2004	2003 /1	2004	2003
Liquid	83	78	83	78
Frozen	0	48	0	48
Dried	0	40	0	40
Total	83	166	83	166

INSPECTED SHELL EGGS**U.S EXPORTS TO CANADA, IN 30-DOZEN CASES (000) (PRELIMINARY)**

	Week Ending		Year-To-Date	
	January 10, 2004			
	2004	2003 /1	2004	2003
Jumbo	50	0	50	0
Extra Large	0	0	0	0
Large	2,093	905	2,093	905
Medium	30	20	30	20
Ungraded	0	1,470	0	1,470
Misc	0	0	0	0
Total	2,173	2,395	2,173	2,395

/1 Comparable Week, to-date figures may not total due to rounding. Data Source: Agriculture Canada, Poultry Development Division
Source: USDA/AMS Poultry Programs, Market News Branch in cooperation with Agriculture Canada, Poultry Development Division.

U.S. /CANADIAN LIVE POULTRY SLAUGHTERED UNDER INSPECTION

Week Ending 10-Jan-04

U.S. FOWL SLAUGHTERED DOMESTICALLY

	LIGHT HENS	HEAVY HENS	TOTAL HENS
	THOUSANDS		
HEAD	1,258	1,312	2,570
LAST WEEK	1,118	898	2,016
SAME WEEK YR AGO	1,736	1,413	3,149
TO-DATE/2004	1,258	1,312	2,570
TO-DATE/2003	1,736	1,413	3,149

U.S. FOWL SLAUGHTERED IN CANADA

	LIGHT HENS	HEAVY HENS	TOTAL HENS
	THOUSANDS		
HEAD	343	0	343
LAST WEEK	150	0	150
SAME WEEK YR AGO	425	7	432
TO-DATE/2004	343	0	343
TO-DATE/2003	425	7	432

SOURCE: Agriculture Canada, Poultry Development Division

TOTAL U.S. FOWL SLAUGHTERED IN THE U.S. AND CANADA

	LIGHT HENS	HEAVY HENS	TOTAL HENS
HEAD	1,601	1,312	2,913
LAST WEEK	1,268	898	2,166
SAME WEEK YR AGO	2,161	1,420	3,581
TO-DATE/2004	1,601	1,312	2,913
TO-DATE/2003	2,161	1,420	3,581

SOURCE: USDA/AMS Poultry Programs, Market News Branch